



Case Study: Helping Client to Increase Leads and Manage existing Accounts to generate Opportunities

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Project Summary

The Client partners with other companies and stakeholders to support and strengthen organizations during times of transition, stress or distress. Whether outlining strategies to accelerate growth, improving an operating inefficiency, solving a working capital shortfall, providing urgent crisis management, or guiding a company through a bankruptcy. The client may quickly assess best options for each situation and then collaboratively stabilize and implement successful, value-producing solutions for its clients and stakeholders.

Executive Summary

The significant reason, the client needed CRM to support their users in the field was to quickly updates activities, new contacts and provide quick access to important data to work.

Goals & Challenges

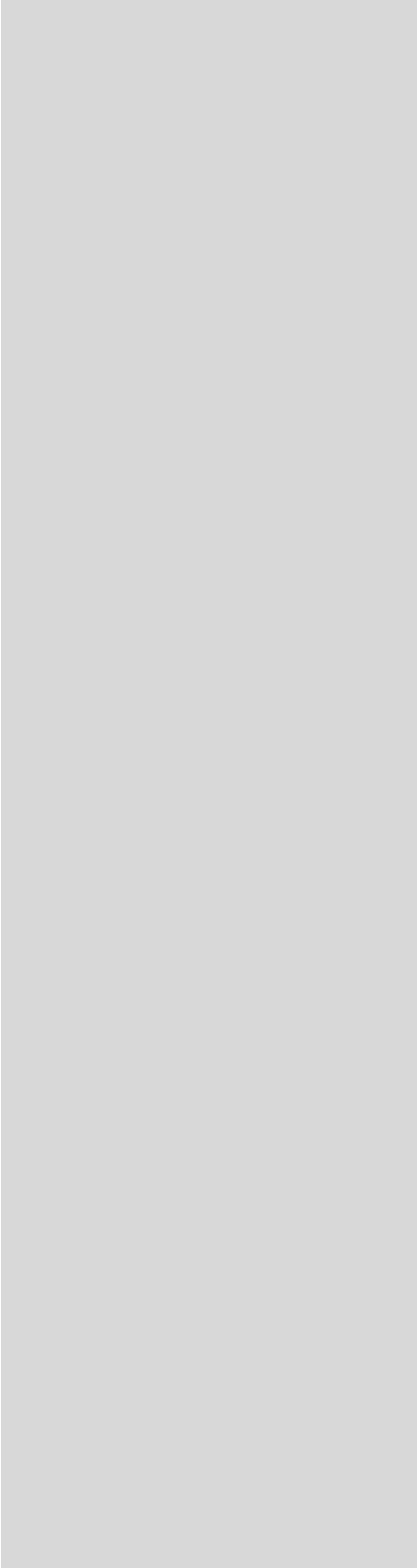

The goal of CRM Project was to collect Contacts of various sources like Lenders, Attorney's and Private Equity firms for new business, tracking and activities to keep the client ahead to its competitors.

The major objectives of the clients were:

- Increase Contacts and accounts to generate more opportunities
- Provide Employees to work through any client i.e desktop/mobile app and offline/online.
- The app should connect the mutual contact as the relationship for each Employee.
- Contacts can be synced between Outlook and CRM by default
- Restrict the contact based on the partner

Solution

Client worked with Ray Business Technologies to address their specific needs to achieve their goals and gain competitive advantage. Raybiztech developed



Dynamic CRM with Outlook integration. By which the client can now work anywhere from the field, so that they can bring more contacts.

Raybiztech also customized the sync between Outlooks to CRM from bi-directional to unidirectional also brought the feature to generate V-card from the existing contact as an email, so the client can review the contact and can create new or update the existing contact which helps in preventing the creation of Duplicate contacts. Raybiztech developed the Notification feature, which will trigger notification on new contact, update of contact to the Admin, so they can follow up with the partners.

Additionally, Raybiztech implemented record based security to manage, who can view or update the contact to help client to maintain their contact information confidentially from other partner.

Benefits/Business Case

The Client has been benefitted by deploying RBT as below:

- Faster development: We could build the application faster with fewer resources.
- Easily maintainable document management system with workflows.
- The client received Support in upgrading the Dynamics CRM from older version to latest version.
- Quality deliverables, so client did not need to put their time to manage and test project.

About Ray Business Technologies Pvt Ltd

Ray Business Technologies Private Limited is a Global Information Technology (IT) Services and Solutions company. We are a CMMI Level 3 company, providing cutting-edge IT Solutions to Enterprises worldwide, enabling them to utilize available resources effectively and manage the operations. Our excellent team of Technology Professionals work with enterprise clients in North America, Latin America, Australia, Europe, Middle East and Asia.

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